TO:	Development Services Customers
SUBJECT:	**INFORMATION BULLETIN #216** Electronic Plan Review
DATE:	November 12, 2013 (Revised June 1, 2014)
CREATED BY:	Plan Review

Purpose:

This Information Bulletin provides guidance on submitting building plans for review in an electronic format (E-Plan Review). Development Services implemented Phase 1 of electronic plan review in November 2013. In June 2014, the department implemented Phase 2 allowing customers to log into a secure web portal and submit digital plan sets for electronic review. This allows for concurrent reviews by multiple reviewers and disciplines. Electronic plans are stored on a secure server maintained by the City. Once approved, plans will be stamped and provided to you through a link on the customer web portal. Development Services updated this Information Bulletin to provide instructions on how to submit plans using the web portal and to clarify the size of commercial plans available for electronic plan review.

Scope:

E-Plan Review is available for the following permit types:

- **Residential building permits** – New one-and two-family dwellings and townhouses as defined by the International Residential Code as well as additions to existing residential.
- **Commercial building permits** – New commercial structures; additions, interior remodels and first time finish outs; grading permits, site work permits, foundation permits; and shell permits.
- **Trade Permits** – Tree, electrical, mechanical, and plumbing permits requiring plan review.

E-Plan Review is not yet available for these permit types:

- **Complex Commercial projects** that would require multiple rolls of paper plans if printed (hospitals, apartment complexes, etc).
- **Commercial walk-through ("Same-Day") permits**
- **Miscellaneous ("Over-the-Counter") permits** (e.g., general repair, swimming pool permits, etc)
- **Fire Permits** – Fire protection system permits (e.g., fire sprinkler, fire alarm, fire extinguishing suppression systems, hazardous material tanks, underground fire mains, etc)

Submittal Procedures:

- Customers can log into the E-Plan Review System using their Dynamic Portal account credentials at https://planreview.sanantonio.gov/ to electronically submit plans and construction documents. The step-by-step instructions on using the E-Plan Review System can be found in Attachment 1.
- Customers will use drop-down menus to select the application type, document type, add notes to the intake team, and upload all pertinent documents (permit application, drawings, building permit checklist, applicable reports, affidavits, engineering letters, other supporting documents).

- Files will be named in a way so the intake and review teams can quickly identify files by discipline and purpose. Please do not use special characters or symbols, only letters and numbers.

- **Residential and Small Commercial Projects -** under 20 pages of design sheets can all be contained in one file (architectural, electrical, mechanical, plumbing, etc). All other files will be listed separately (application, reports, letters, affidavits etc).

- **File Format** – All submitted files will be in PDF format. Scanned documents are not recommended as scanning degrades the quality of the image and creates noise for the plan review software. If you must scan documents, the resolution should not be less than 300 dpi (dots per inch). Plans submitted in an unacceptable or unreadable format will be rejected during the intake process.

- **File Size** – Each PDF file (drawing, document, letter, etc) is limited to a maximum of 85MB. If your design files for each discipline exceeds 85 MB, please separate and identify them accordingly. Example; if the architectural file was 104 MB total, you would split them into two files (Architectural1 at 85 MB and Architectural2 at 19MB). This will also require that you submit the documents in separate groups (see following paragraph).

- **Plan Set Size** – The total size for all files submitted at one time in the E-Plan Review system cannot exceed 85MB total. If individual plans are under 85 MB each but the total project combined exceeds 85 MB, customers can still submit plans electronically but must do so in groups of files 85 MB or smaller at a time. Customers can use the "Update" link to add additional files to their project if they exceed 85 MB.

- **Stamping** – The lower left hand corner of the plan sets should be left blank in order to allow for the plan review team to place approval stamps. If not left blank, do not place critical design information in that corner.

- **Development Services In-Take Process**. The Completeness and Assignment Review (CAR) Team will complete the intake process and ensure the electronic submittal package is complete. Refer to IB 147 for a description of the Completeness Review Process for commercial projects. If any files or required forms or letters are missing or contain corrupt files, the project will be placed on hold and the applicant/owner will be notified as prescribed in IB 147. Customers will submit required missing items using the "Update" link in the E-Plan Review Customer Portal to add additional files. Once the E-Plan Review submittal package is deemed complete, Development Services staff will issue an AP number, and notify customers of fees due. After fees are paid, the E-Plan Review process will begin.

- **Development Services Review Process**. The department will review electronic plans and other permit submittal documents using the City's electronic plan review software. Each reviewer will either approve or deny their respective review similar to the paper permit submittal process. The review status will be updated in the City's system of record for plan review. The status of reviews can be viewed on-line and in real time through the Development Services web page. If the plans are denied, the reviewer will send the denial comments to the project contact listed on the building permit application through the E-Plan Review Customer Portal and may send annotated drawings in some cases to clarify comments.

- **Responses to Plan Review Denial Comments.** Responses to plan review denial comments (i.e., re-submittal form, cover letters, revised plans and other constructions documents, etc.) shall be submitted to Development Services in the same manner as outlined in IB 111 for the paper permit submittal process, with the exception that all revised documents and re-submittal cover letters shall be submitted through the E-Plan Review Customer Portal in a PDF format as described in this IB. The department recommends the following naming convention for the second and subsequent reviews:

  - Architectual-R2
  - Civil-R2
  - Determination of Special Inspections-R2

Subsequent reviews should follow this naming convention (i.e., Civil-R3 for Review 3).

o Customers should only submit revisions to those PDF files that need to be modified. For example, if only the original architectural file submitted required changes, only submit a revised set of that architectural file and not the entire plan set containing all other disciplines. Please ensure the entire original file with the changes are submitted and not just the individual revised sheets (ie: complete architectural file or complete civil file).

o Revised drawings, forms and reports shall be named to note the revision and shall be named in a way so the reviewer can quickly identify each file. Use revision clouds and/or markers to identify all plan changes on your corrected drawing set.

- **Development Services Permitting Process** - When all reviews have been completed and approved, Development Services will notify the customer that permit fees are due and request the applicant pay for the permit. Fees can be paid on-line using a credit card or escrow account. Once the permit fees are paid, please contact the plans management team at dsdfrontcounter@sanantonio.gov and they will issue the permit and upload the approved plans to the E-Plan Review Customer Portal.

  - The approved plans will be all of the customer submitted PDF files (with latest revisions and redlined approval notes from plan examiners) that include a City approval stamp. Plans are read and print only and no modifications or design changes can be made.

  - The customer will be able to make as many printed copies as needed from the approved plan set.

After permit issuance, the customer will be required to provide one hardcopy of the approved plans at the project site for City Inspectors. The City would prefer the approved plans be printed in color in order to assist the inspectors in quickly identifying key inspection items.

- **Post-Permit Issuance Revisions** – If changes are required after the permit has been issued, the applicant will:

  - Prepare a completed set of REVISED drawings and identify all changes with revision clouds and/or markers.
  - Each design discipline should have a separate file as described in this IB, however submission of individual sheets with design changes is preferred, not the entire original file.
  - Files will follow the naming convention below:
    - Architectual.PP1
    - Civil Sheet C0.3.PP1

  - Prepare other revised supplemental documents (i.e., REVISED Plans, REVISED calculations, REVISED engineering reports, and other REVISED permit documents) and submit to Development Services with all the files in PDF format through the E-Plan Review Customer Portal. Please include a cover letter as an attachment explaining the design changes.

Revised drawings, forms and reports shall be named to note the revision number and date, and be named in a way so the reviewer can quickly identify each file.

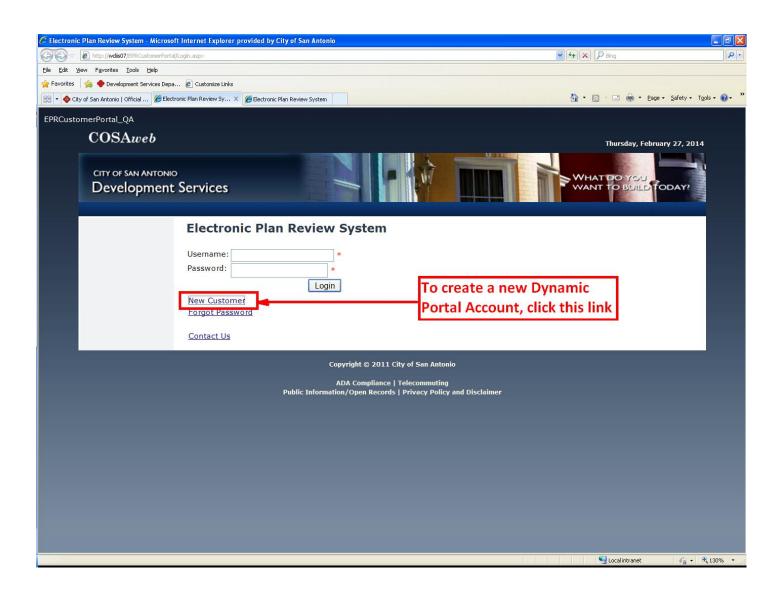- The remainder of this process is the same as above.

Summary:

Development Services plans to make continuous improvement to its Electronic Plan Review program. Since we are all pioneering this new process, your feedback is appreciated to help improve the process, our service delivery and your next visit.
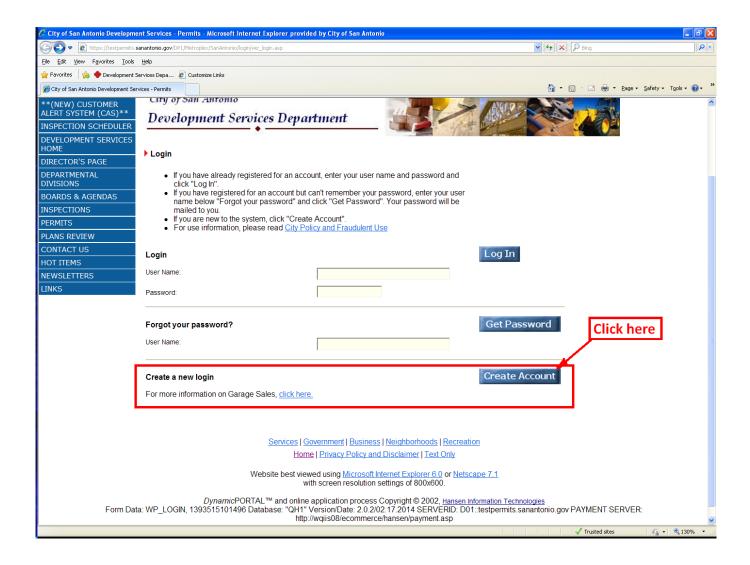
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The e-Plan Review Portal is a mechanism for customers to start the process to apply for a permit, upload construction plan sets, as well as other submittal documents, and submit them electronically. It is a repository for electronic plan files and allows the intake team to ensure electronic documents and plans are complete, applicable fees have been paid and then create the permit number in Hansen. Plans are then placed into the electronic plan review queue and become available for plan examiners. The Reviewer Portal allows plans examiners to provide comments, annotated drawings and approved plan sets to our customers electronically through the Customer Portal. All reviews, markups and annotations are accomplished using Brava and are stored in our document management system, FileNet.

To use the Electronic Plan Review Portal, you must have a Hansen Dynamic Portal account. If you have never created a Dynamic Portal account, click on the "New Customer" link and you will be redirected to the Dynamic Portal to create a new account. If you have created an account but cannot remember your login information, click on the "Forgot Password" link and you will be guided through the steps to reset your password. If at any time you need assistance, please call the Development Services Customer Service Center at 207-1111 and one of our team members will help you.

This is the Dynamic Portal landing page. From here you can log in to the Dynamic Portal and check the status of your projects. If you have never created an account before, click on the "Create Account" button.
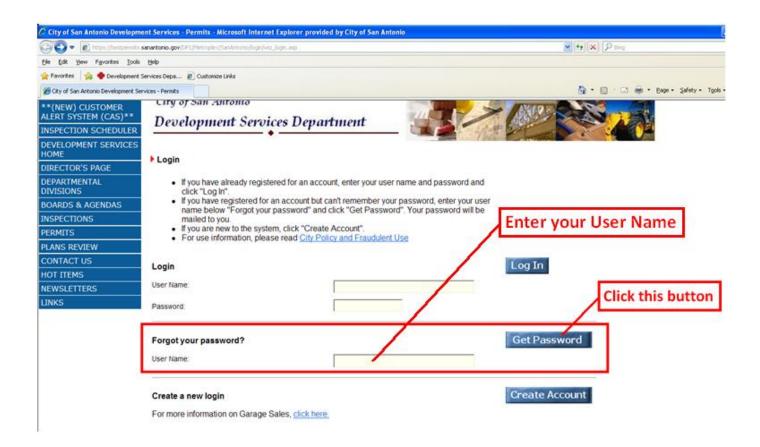
Creating a Dynamic Portal account requires minimal personal information. Once the form is complete and you click the "Next" button, it may take several minutes for an account to be created, but could take up to 24 hours. Once the account is established, you will receive an e-mail with your login information.

Within the screenshot:

City of San Antonio
Development Services Department

▶ **Personal Information:** Information about the person requesting service.

Enter your information.
1) Enter your preferred user name for login purposes.
2) Enter your email address. This email address will be used to mail your initial password and for submission notifications. You will be able to change your password later in "Modify Account".
3) Enter your contact information to be used with your permits.
4) Click "Next."

NOTE: You will receive your password within the next 24 hours.

✱ = Required Information
User Name: ✱

Email: ✱

First Name: ✱   Middle Initial: Last Name: ✱

Address: ✱

City: ✱   State/Province: ✱

Postal Code/Zip: ✱   Country:

Daytime Phone: Evening Phone:

Cancel   Next ▶

Provide the information on this form and press the "Next" button

If you have already created a Dynamic Portal account but cannot remember your password, click on the "Forgot Password" link and you will be directed to the Dynamic Portal page.

Enter your User Name and then click the "Submit" button. You will receive an e-mail to help you recover your password. If you cannot remember your User Name, please contact the Development Services Customer Service Center at 207-1111 and a team member will assist you.

On the Customer Portal page, enter in your login information and click the "Login" button.

To create a new project, click the "Create New" link. A project consists of a single permit application. Multiple building permits for a larger construction project will require a separate "Project" created in the Customer Portal for each permit.

Enter the name of the project (the name you want reflected on the permit) or address in the "Project Name" field. This field may be modified later. Please use only a combination of letters and numbers when naming your permit. Do not use special characters or symbols. Select the permit application type (Commercial, Miscellaneous or Residential) from the drop-down menu.

At this stage you will add documents (drawings, permit application, forms, reports, letters, etc) to your permit. Select the appropriate document type from the drop-down list.

Permits for buildings or building systems, select "Commercial" or "Residential." Permits for buildings that are not occupiable, select "Miscellaneous." Select "Local Government-Owned Facilities" for a City or County facility. Maps, Plats and Zoning Maps are not accepted at this time.

You can add notes, comments or special instructions for the intake team in the "Add Notes" field. This is not a required field FOR THE ORIGINAL SUBMISSION, but is required for re-submittal documents and post-permit revisions. For Resubmittal documents, indicate which reviewer, department, or discipline (building, fire, mechanical, etc) the documents are intended for.

In the "Attachment" section, you can add plan sets (in pdf only) permit applications, special reports, engineering letters, affidavits and other documents required to obtain a permit. After clicking the "Browse" button another window will be displayed showing you the files and folders on your computer.

Navigate to the drive or folder containing the files you wish to upload. Double-click the file or click the file once to highlight it and then click the "Open" or "OK" button. Per the Electronic Plan Review Information Bulletin, design sheets should be named so the intake team and plan reviewers can quickly locate plans based on their discipline (architectural, civil, electrical, mechanical, etc.) If one file is larger than 85 megabytes, please divide them into separate files and name them accordingly. In this example, if the architectural sheets (Architectural.pdf) were 100 megabytes, the file should be saved as two files and named Architectural 1 and Architectural 2.

There is a limit to the number of files you can attach and a limit on the total file size of all of your attachments combined. You can add up to 10 files, each one at a time, with a total file size of 85 megabytes for all documents submitted together. The Customer Portal will calculate the file size for you. If your project has 30 pdf files, you would add the first 10 files (up to 85MB) under the "Create New" link and then use the "Update" link to add the additional files. All documents will be submitted and stored under the same project, even if they are added at different times.

The Electronic Plan Review submittal portal will calculate the total size of your selected files and display it in the attachments menu. It will also let you know how many attachments you have included in your submission.

You can view any of the documents you've uploaded and remove them individually if you change your mind about including a particular file.

After selecting the document you want to attach, select the "Plan Type" plan type from the drop-down menu. You will see a Plan Type "Drawings Other" and "Miscellaneous" for drawing and other pdf files that do not seem to fit in the list.

After selecting all of your files and indicating the types of documents they are, click the "Submit" button.

The submission will be saved and all files will be uploaded.

After the files have been successfully uploaded, the system will generate a unique EPR number. This number can be used to locate projects until the Intake Team conducts a completeness review to ensure all applicable and required documents were included in your project submission. Please note this is not a permit (AP) number. AP numbers are assigned only when the appropriate fees are paid and all required documents have been received.

During the submission process, you may receive notification from the Intake Team that further documents are needed (engineer's letter, tree affidavit, etc). To view the comments from the intake team, click on the "Comments" link. Later you will also choose "Comments" to review plan review comments from plan examiners who have reviewed your plans.

Click on the "Select" link for the project you received comments or questions for. As you add projects or reviews are conducted, you may see many comments in the system. You may click on the "Hansen #" column heading to sort by AP number, "Name" to sort by project name, or "Created Date" to sort by the date you created the project.

In this case, a fire flow report is required for this project. Specific information will be typed into the "Comments" section and the "Message Body" will be sent to you via e-mail informing you there are comments concerning your project.
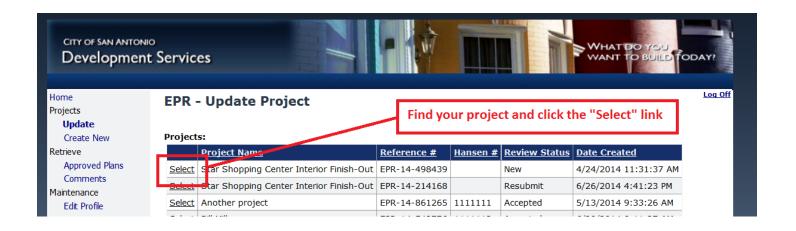

Use the "Update" link to add more files to your project to complete the completeness review, for a plan review re-submittal, or to add post permit changes (changes that require plan review and approvals for inspection purposes).

IMPORTANT: When you re-submit documents in response to plan review comments, use the "Comments" section to indicate who the re-submittal files are intended for. Identifying the name of the reviewer or discipline requiring the the documents helps ensure the proper reviews are routed and performed in a timely manner.
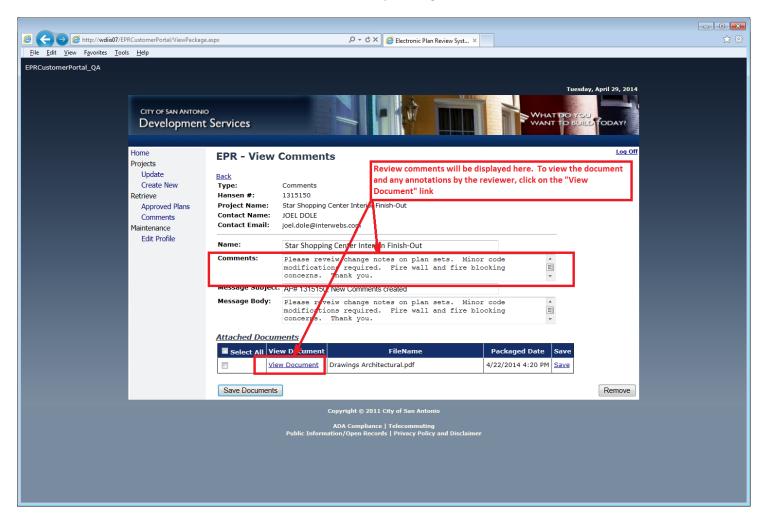

Find the applicable project and click the "Select" link. If you have multiple projects in queue, they will all be listed here. If there is no Hansen number, then the project is still in intake and plan review has not started. If the "Review Status" is "New" the plans/permit application is still in completeness review. Sorting by "Review Status" and selecting "New" projects will show all projects that are in completeness review.
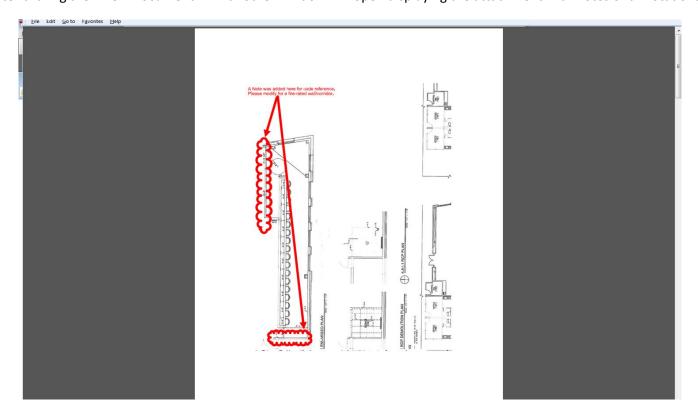
You may receive e-mail notifications with comments from plan reviewers or the intake staff with feedback concerning your project. You will be directed to log on to the Customer Portal to retrieve them. Once you are logged on, you can view the comments by clicking the "Comments" link and clicking the "Select" link for your project.
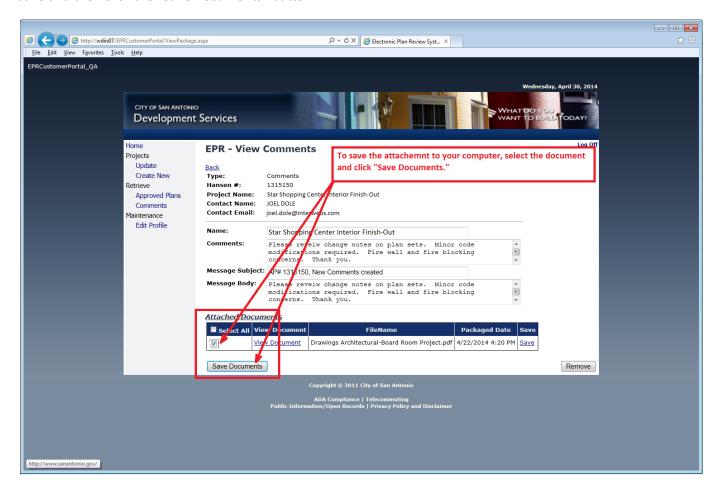

The comments from the reviewer or intake team will be displayed in the "Comments" box. You can view any attachments and annotations the review team has attached by clicking on the "View Document" link below.
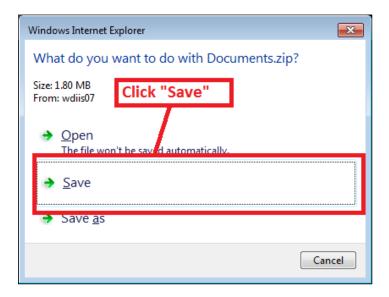
After clicking the "View Document" link another window will open displaying the attachment with notes or annotations.
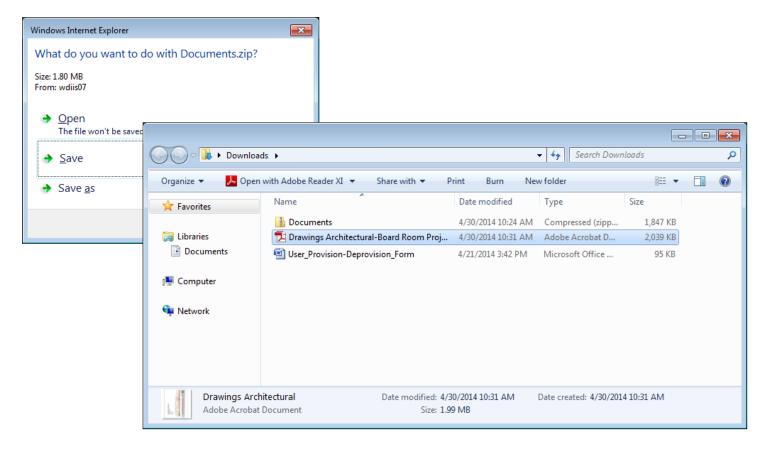

You can save the attachments to your computer by placing a check mark in the box next to the attachments you wish to save and then click the "Save Documents" button.

A pop-up window will appear prompting you to open, save the attachment, or save and modify the name or file type. Click "Save." Depending on your operating system, these options may be different than depicted here.

Another pop-up window will appear prompting you to select the location on your computer to save the file.
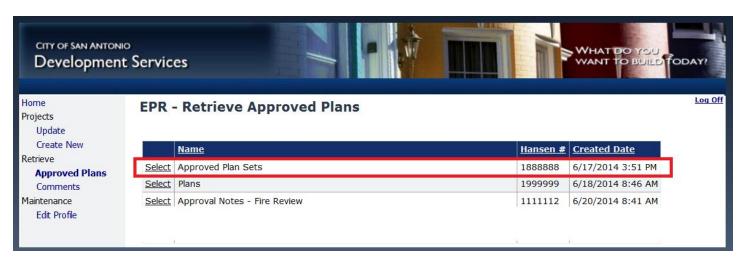
Once your plans are approved, you can download them and save them to your computer by clicking on the "Approved Plans" link. You are required to retrieve the final city approved plans, print them and have them available on the job site for inspectors. **It is highly recommended to print plans in color to see approval comments, markups and annotations.**

Use the "Approved Plans" link to view and download approved single drawings submitted for "post permit" review. These are submittals that show change orders or significant changes to the city approved plans and required to be submitted for plan review. Plan examiners will have retrieved the "post permit" submittal, reviewed the changes to the plan and are returning the approved changes back to you to have available in the field as a hard copy.
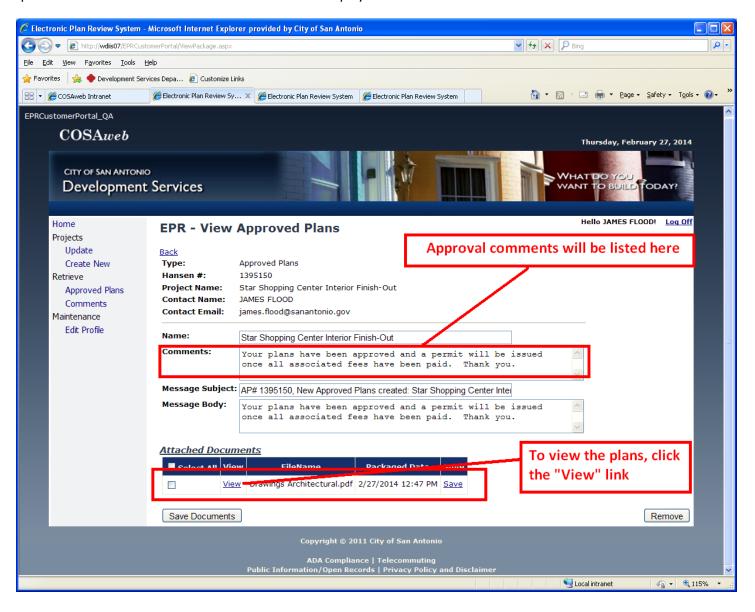
It is highly recommended to print the plans in color for inspection purposes to show mark-ups, annotations and approval notes.
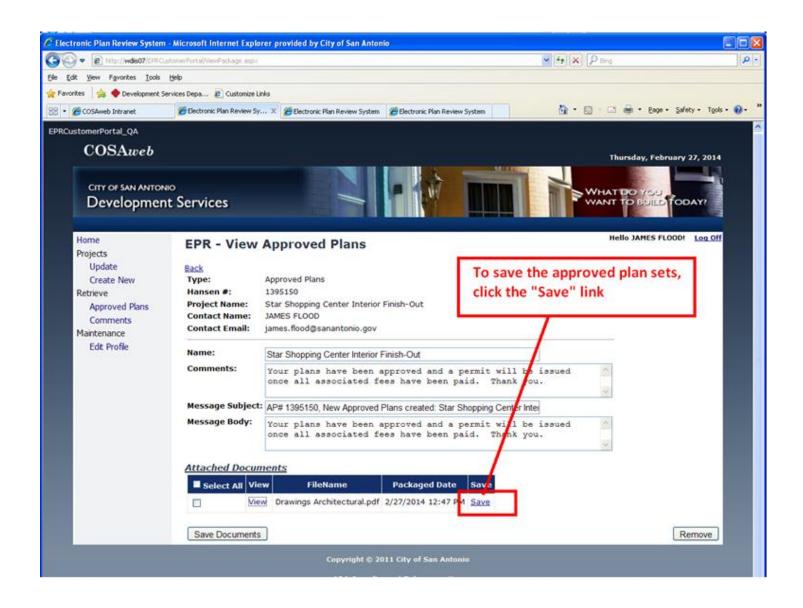

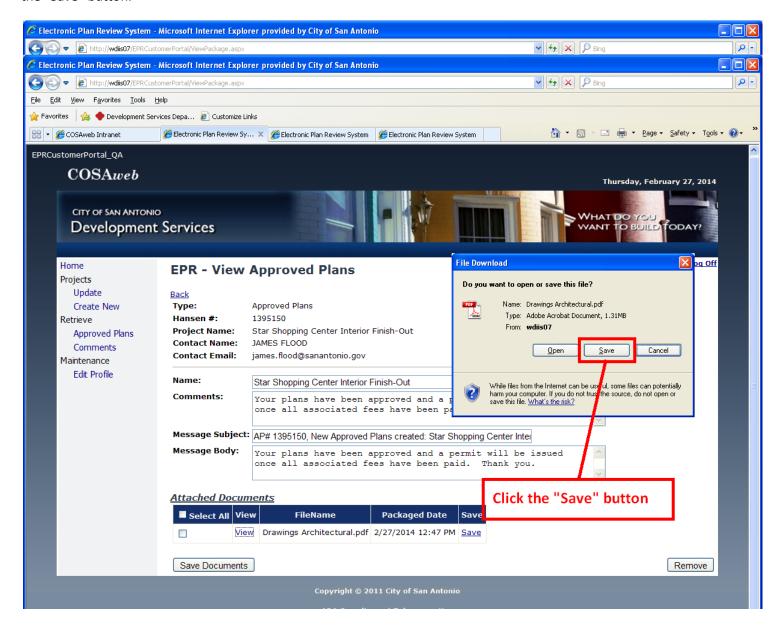Click on the "Select" link for the plan sets.

Special notes or comments from the review will be displayed here.

To save your approved plans, click on the "Save" link. If you have multiple plan sets (for larger projects), check each of the boxes for the plans you want to save or check the "Select All" box in the header.   The plans will be saved as pdf documents and maintain the naming convention listed in the "File Name" column. In this case the saved file will maintain the name "Drawings Architectural.pdf."

After clicking the "Save" link, a file download dialog box will be displayed prompting you to open or save the file—click the "Save" button.

Click the "Save" button

Another window will be generated asking you to select the location on your computer to save the file. In this example we have selected the "Project" folder on the local drive on the computer (C:). All approved plans must be printed and kept on the job site after construction starts and must be available to inspectors at all times.